



# CONTRA COSTA COUNTY FOOD SYSTEM ANALYSIS AND ECONOMIC STRATEGY

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*Agricultural Infrastructure  
Assessment Report*



Prepared for  
Contra Costa County, California  
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# Contra Costa County Food System Analysis and Economic Strategy

## AGRICULTURAL INFRASTRUCTURE ASSESSMENT REPORT

### I. Introduction

#### Delta Protection Commission

The Delta Protection Commission provided the funding for this analysis as a follow-on to its *Economic Sustainability Plan* which was prepared for the Sacramento-San Joaquin Delta in 2012 (“ESP”). The ESP used a variety of data sources and modeling and projected moderate changes in cropping patterns and shifts to production of higher value crops, including specialty crops over time.

Consumer demand for locally grown food is increasing, particularly in the metropolitan regions surrounding the Delta.

Individual households, restaurants, grocery stores, fresh produce distributors, and institutions such as schools and hospitals are seeking locally grown food. Growers, consumers, and policy makers also are focusing on the many public benefits of local agriculture, including the public health benefits of increasing access to locally grown produce in underserved communities, the economic development and job creation potential of the agricultural sector, the climate protection, open space and recreational benefits of urban-edge agricultural land, the benefits of agri-tourism, and the sense of history and place that farming provides to Contra Costa County and the Delta.

#### Contra Costa County

Contra Costa County is a Bay Area county with the potential to further build upon a local food-system, following its long agricultural history. The County is geographically divided between productive farmland of Brentwood in the east and the dense urban populations of central Contra Costa and Richmond. However, while Contra Costa farmers grow a diversified volume of fruits



The mission of the Delta Protection Commission is to adaptively protect, maintain, and where possible, enhance and restore the overall quality of the Delta environment consistent with the Delta Protection Act and the Land Use and Resource Management Plan for the Primary Zone. This includes, but is not limited to, agriculture, wildlife habitat, and recreational activities. The goal of the Commission is to ensure orderly, balanced conservation and development of Delta land resources and improved flood protection.

and vegetables, many urban communities in Contra Costa County do not have adequate access to fresh fruits and vegetables and are facing a public health crisis of childhood obesity, diabetes, and heart disease.

While Contra Costa County has all of the components of a local food system, it can further develop this system to provide more source-identified local food directly to urban communities and throughout the Bay Area and Northern California. Over the years, Contra Costa's agricultural infrastructure, packing, and processing facilities have diminished. Consequently, food grown in Contra Costa leaves the county for distribution, processing, and manufacturing that adds value to its agricultural products. A further developed local food system could provide all Contra Costa County's urban residents with fresh, healthy food, build its agricultural economy, create jobs, and keep more food-generated dollars in its communities.

Contra Costa County is a Delta county that is well positioned to augment a more vibrant agricultural economy. The County can build upon its:

- Extraordinary soils, Mediterranean climate, year-round growing season, and inexpensive water.
- Land use certainty and agricultural conservation resulting in increased investment in land and farming operations.
- Significant specialty crop production – row crops, orchards, nuts and wine grapes – with increasing organic production.
- Proximity to Bay Area markets.
- Undeveloped processing opportunities to take advantage of wine grapes, cannery tomatoes, vegetable and orchard crops.
- Fifty-percent of the Delta's agricultural tourism.
- Engaged county and city officials.
- Multi-generational farming families with children returning to the family farming operations after college.
- Active grassroots support for local agriculture through the Contra Costa Food System Alliance and other community organizations.

## II. Objective of Report

The objective of this report is to perform an independent and objective inventory of existing Contra Costa County agricultural infrastructure, including packing and processing facilities, transportation infrastructure, and agricultural tourism venues. More specifically, agricultural infrastructure encompasses aspects of aggregation, packing, processing, storage, marketing, and distribution capacity and facilities.

## III. Analysis of Contra Costa County Agricultural Infrastructure

Historically, Contra Costa County has been the site of an array of agricultural infrastructure ranging from packing sheds, warehouses and cold storage, canneries, wineries, and processing facilities to current-day roadside farm stands and u-pick orchards and fields. The make-up of its agricultural infrastructure has over the years reflected the production patterns, crop mix, and market demands of the era. From orchard crops such as peaches, apricots, walnuts, and cherries to field crops such as lettuce, tomatoes, fresh beans, and other vegetables, packing sheds, hullers, and warehouses were once more fully-utilized to pack and prepare product for market. Canneries also dotted the landscape serving the needs of processing the abundant fruit and vegetable production, but also the fishing industry of the past. However, similar to other areas of California, agricultural infrastructure that had previously existed throughout the County has been lost over time due to changing markets and consumption patterns, industry consolidation, economies of scale, regulatory issues, urbanization, value of land, and other assorted factors.

### A. Current Agricultural Infrastructure in Contra Costa County

Over the last several decades, Contra Costa County agriculture has produced a wide variety of premium-quality fruits, nuts, vegetables, and some value added agricultural products, including wines, oils, and other processed items. Its production has been largely dependent upon regional, national, and international market demands as well as to a lesser extent on direct marketing opportunities such as roadside farm stands, u-pick, farmers markets, and community supported agriculture (“CSA”). As a result, Contra Costa County’s current agricultural infrastructure reflects the needs of both the production mix, but also upon the

needs of external market structures and distribution networks of the various commodities grown. The agricultural infrastructure is also highly dependent upon the scale and size of production and/or processing as enumerated below.

### **1. Large Scale Production Infrastructure**

Much of the existing agricultural infrastructure is geared for large volume production crops such as sweet corn and beans which are mostly exported from the County to larger distribution facilities in the Central Valley, the Northwest, or beyond. Many, if not most of the largest producers of the major Contra Costa County crops maintain packing sheds and cold storage facilities for initial packing of their production for distribution. For example, the leading producers of sweet corn utilize either field packing or packing sheds, then icing/slushing of their production. This requires both a packing facility as well as cold storage capabilities before the sweet corn is shipped off the same-day it's harvested to end-users and direct consumers. Fresh beans and other vegetables may also utilize these same facilities for packing before distribution to grocery store chains, wholesale distributors, and other outlets outside of Contra Costa County.

Other large volume production crops such as processing tomatoes require far less infrastructure. Tomatoes are usually harvested directly into truck-hauled totes and driven directly from the field to canneries and processing facilities in the Central Valley. Additionally, orchard crops such as cherries are picked then trucked to packing facilities in nearby Central Valley communities for packaging and distribution for both domestic and international markets. Walnuts are hulled in a handful of locations, then shipped off to larger handling and processing facilities in the Central Valley.

### **2. Mid- and Small-Scale Production Infrastructure**

According to the California Department of Food and Agriculture's Shipping Point Inspection Branch, there are no facilities in Contra Costa County that contract for their services. This reflects the changing production patterns of fresh fruits and vegetables in Contra Costa County, but also highlights the growth in the number of smaller farms with production volumes not requiring larger aggregated packing facilities. Many of these smaller operations

producing items such as apples, apricots, asparagus, grapes, green beans, melons, nectarines, olives, onions, peaches, pears, peppers, persimmons, plums, pluots, tomatoes, and walnuts maintain smaller packing sheds and limited warehouse/cold storage space for their own packaging and marketing needs for ultimate sale to wholesale distributors, direct to retail markets, farmers markets, CSAs, and/or roadside stands.

For a prime example, Frog Hollow Farm operates a packing shed and warehouse, where they prepare, pack, and store a myriad of fresh organic products for their retail customers, mail order, farmers markets, and their *Happy Child CSA*<sup>1</sup> boxes. A CSA is a way for individuals, families, and businesses to connect with and support local small farms, and to receive healthy, quality fruits and other seasonal foods. Every week, Frog Hollow Farm's *Happy Child CSA* delivers boxes of fresh fruit to an established neighborhood drop site – often the front porch of a generous neighbor, or a school or business in the community. In addition, Frog Hollow Farm operates a value-added processing line and kitchen that extends the marketing season for their unique blend of products, including dried fruits, baked goods, fruit spreads, olive oil and honey.

Many Contra Costa farms of varying size have also relied upon the growing demand for local production and agri-tourism through the development of roadside farm stands and u-pick orchards and fields. This form of direct marketing is the most popular among all sizes of farms in Contra Costa County. While farm stands reduce farmers' reliance on external operating infrastructure, the tradeoff often is that the infrastructure to bring consumers to the farm –such as signage on agri-tourism routes—often is underdeveloped and outside of the farmer's control. However, this challenge has been continually addressed with the establishment of *Harvest Time in Brentwood* and its mission to promote u-pick farms, roadside stands, and agricultural retail marketing outlets in East Contra Costa County. *Harvest Time* has also established a user-friendly website with numerous tools that highlight the agricultural infrastructure required to operate this important form of agri-tourism



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<sup>1</sup> <http://happychildcsa.com/>, downloaded on February 4, 2015.

and economic opportunity. **Attachment 1** lists the products and farms and their locations on the attached map.

### 3. Valued-added Processing and Distribution Infrastructure

Another important component of Contra Costa County's food system and agricultural infrastructure is found not in the fields and orchards of East County, but most often in the streets of the more urban areas of the region. In more recent times, food processing companies and facilities have flown under the radar screen of prominence and visibility. However, value-added food processing and distribution is very much a part of the economic fabric of Contra Costa County and could add even more value with the growth in co-packing<sup>2</sup> across the state and country, especially in the exploding specialty and ethnic food sectors.

According to the California League of Food Processors ("CLFP"), food processing is the third largest industry in the state with over 3,000 registered food processing businesses and over \$82 billion in annual economic impact within California.<sup>3</sup> However, based upon California Department of Public Health registrations, there are less than 100 of those businesses in Contra Costa County, and many of those listed are grocery stores, food banks, and other organizations that are required to register because they make food on their premises.

Nevertheless, there are a number of value-added food processing companies and co-packers emerging across Contra Costa County, many targeted at specialty and artisan products, but also at the emerging Hispanic and Asian consumer markets in California and across the western United States. **Table 1** highlights a select number of these companies. A full listing of Contra Costa food processors is included as **Attachment 2**.

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<sup>2</sup> A contract packer or co-packer is a company that manufactures and packages food or other products for their clients. To market and distribute, a co-packer works under contract with the hiring company to manufacture food as though the products were manufactured directly by the hiring company.

<sup>3</sup> "The Economic Impact of Food and Beverage Processing in California and Its Cities and Counties," Prepared for the California League of Food Processors by Richard J. Sexton, Josue Medellin-Azuara, and Tina L. Saitone, January 2015.

**Table 1: Selected Food Processing Companies in Contra Costa County<sup>4</sup>**

<b>Company</b>	<b>Location</b>	<b>Description of Business</b>
Frog Hollow Farm, LLC	Brentwood, CA	Value-added processor of organic products
Artisan Sweets, Inc.	Concord, CA	Candy, nut and confectionary processor
Arnon Oren, Inc.	El Cerrito, CA	Local, organic and sustainably produced nuts
The Nut Factory	Lafayette, CA	Dried fruit, nuts and gift boxes
Baron’s Specialty Foods, Inc.	Martinez, CA	Spices and seasonings
Continente Nut, LLC.	Oakley, CA	Dried fruit, nuts and gift boxes
Tulkoff Food Products West, Inc.	Pittsburg, CA	Wholesale food product manufacturer that services five markets: co packing, retail, food service, industrial, and kosher.
All Star Tamales	Pittsburg, CA	Mexican American food processor catering to farmers markets
Ramar International Corp.	Pittsburg, CA	Filipino American food processor of ice cream and Asian specialty frozen food products
The Bonami Baking Company, Inc.	Pittsburg, CA	Wholesale baker of bread, pastry, pies and cakes
Avri Companies, Inc.	Richmond, CA	Processor of flavorings and fragrances
California Oils Corporation	Richmond, CA	Japanese-owned processor and supplier of high quality vegetable oils
Grace Baking Company	Richmond, CA	Wholesale baker of artisan breads
Bio Essence Corporation	Richmond, CA	Leader in Chinese herbal remedies and nutritional health supplements
Rubicon Bakery	Richmond, CA	Wholesale dessert bakery
Lotus Foods Inc.	Richmond, CA	Specialty, heirloom organic rice
Savvy Savories, Inc.	Richmond, CA	Healthy, ready-to-eat vegetarian food

<sup>4</sup> California Department of Public Health Processed Food Registrations, 2014.

Atherstone Food, Inc.	Richmond, CA	Ready-to-eat salads and wraps
Cuisine Perel	Richmond, CA	Line of wine and fruit infused vinegars, flavored grape seed oils and other fine gourmet food products
Casa Chicas	Richmond, CA	Mexican American makers of authentic chips, guacamole, salsas, and hot sauce

A couple of these companies are worth further noting as they serve as prime models for future economic opportunities in Contra Costa County. Frog Hollow Farm was previously mentioned, but should also be highlighted as an example of adding economic value to their fresh organic specialty crop production through further processing and packaging of their products in a diversity of forms.

Another prime example of the future of food processing opportunities is Ramar International Corporation located in Pittsburg. Founded in Oakland in 1969, the Quesada family moved their headquarters and sole production facility to Pittsburg in 1989. They have since grown into America’s #1 Filipino Food company, aggressively expanding into the mass natural and specialty markets, including Magnolia Natural Tropical Ice Cream and Orientex Lumpia. They have also added two more manufacturing facilities in Pittsburg to provide an all-natural line of Filipino entrees available at ethnic markets and Whole Foods. They remain a family-owned and operated business, now into their third generation of Quesada family leadership.

An additional important link in Contra Costa County’s agricultural infrastructure is also found in the long-standing wine industry and the number of wineries spread across the County. Many of these are also family businesses dependent upon Contra Costa County wine grape production.

According to both the Contra Costa Winegrowers Association and Appellation American.com, there are several wineries producing wines with Contra Costa designation, including resident and non-resident wineries.<sup>5</sup> Table 2 highlights these wineries:

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<sup>5</sup> Resident wineries are those with production facilities and/or estate vineyards within the boundaries of Contra Costa County. Non-resident wineries are producers located outside of the appellation, but sourcing fruit from and labeling wines with the Contra Costa County designation.

**Table 2: Resident and Non-Resident Wineries in Contra Costa County<sup>6</sup>**

<u>Resident Wineries</u>	<u>Location</u>
Atelier Winery	Healdsburg, CA
Audubon Cellars Winery	Berkeley, CA
Bloomfield Vineyards	Brentwood, CA
Enos Family Vineyards	Brentwood, CA
Hannah Nicole Vineyards	Brentwood, CA
J. Benton Furrow	San Ramon, CA
Parkmon Vineyards	Moraga, CA
Shadowbrook Winery	Walnut Creek, CA
T-Vine Cellars	Calistoga, CA
Viano Vineyards	Martinez, CA
<u>Non-Resident Wineries</u>	
Cline Cellars	Sonoma, CA
Echelon Wineries	Albany, CA
Jade Mountain Vineyard	Napa, CA
Pinder Winery	Campbell, CA
Red Skye Wine	Livermore, CA
Rosenblum Cellars	Healdsburg, CA
Sterling Albert Winery	Concord, CA
Tamayo Family Vineyards	Brentwood, CA
Thomas Coyne Winery	Livermore, CA
Three Wine Company	Clarksburg, CA
Trinitas Cellars	Napa, CA
Turley Wine Cellars	Paso Robles, CA
White Cottage Ranch	Angwin, CA

<sup>6</sup> <http://wine.appellationamerica.com/wine/data/Contra-Costa-County.html>, downloaded February 5, 2015.

#### IV. Methodology

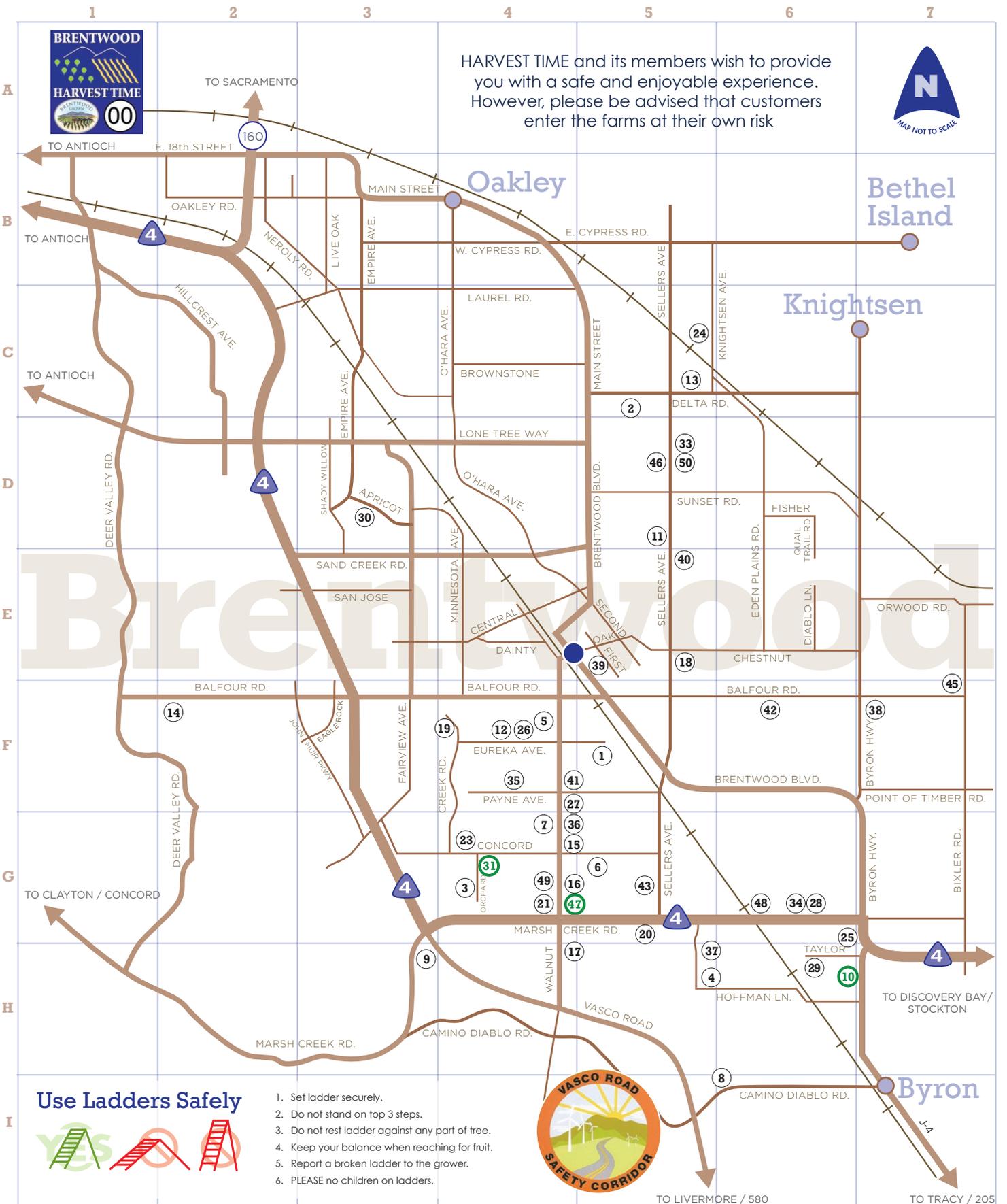
Since there is no available clearinghouse that identifies Contra Costa County agricultural infrastructure, data, information, and research findings utilized in this Report are based solely on interviews and meetings with stakeholders and key informants including growers, policy makers and elected officials, community leaders, business owners, the Contra Costa County Agricultural Commissioner and his staff, Brentwood Agricultural Land Trust, the President and CEO of the California League of Food Processors, and the California Department of Food and Agriculture Shipping Point Inspection Branch Chief. We also relied upon databases provide by the California Department of Public Health, Harvest Time Brentwood, and Appellation America.

#### V. Conclusions

Agricultural infrastructure across Contra Costa County has evolved over time dependent wholly upon the crop production patterns, crop production volumes, and the demands of regional, national, and international markets. As wholesale and retail customer distribution requirements have changed towards more consolidation and centralization, so has Contra Costa County's agricultural infrastructure. Contra Costa County agriculture has historically shown nimbleness and flexibility to meet the needs of the marketplace.

Moreover, Contra Costa County's food processing industry has also evolved with changes in consumer preferences towards specialty food products, ready-to-eat packaging, and an emphasis on ethnic cuisines. Nonetheless, there remains an opportunity to expand much deeper into the value-added food processing and co-packing segment. There is not only the growing opportunity to create new food processing businesses, but also an additional opportunity to provide locally, source identified specialty crops grown in Contra Costa County to these emerging enterprises. Additional agricultural infrastructure will be needed to supply this growing market segment. There needs to be a movement of mid- and smaller-scale growers to aggregate, package, and distribute their production to meet the specific needs of Contra Costa food processors.





## Attachment 2: Food Processing Companies in Contra Costa County

RAFFINE, LLC	DANVILLE	CA
SURATI SWEET MART	ANTIOCH	CA
FROG HOLLOW FARM, LLC	BRENTWOOD	CA
HEAVENLY CHEESECAKES & MORE	BRENTWOOD	CA
MARIN FOOD SPECIALTIES, INC.	BYRON	CA
MORE FLAVOR, INC.	CONCORD	CA
SUPERLATIVE EQUIPMENT CO, INC	CONCORD	CA
ARTISAN SWEETS, INC.	CONCORD	CA
BLACK DIAMOND BREWING CO.	CONCORD	CA
MAMCO FOODS, INC.	CONCORD	CA
BARZEL ENTERPRISES, INC.	CONCORD	CA
POP MAMA POP	PLEASANT HILL	CA
OLIVUS, INC.	CONCORD	CA
OLIVUS, INC.	CONCORD	CA
C & H SUGAR COMPANY, INC.	CROCKETT	CA
NATION'S FOODS, INC.	EL CERRITO	CA
ARNON OREN INC	EL CERRITO	CA
MAURICE H. BUDDY BORN	EL CERRITO	CA
ALOHA SEAFOOD	HERCULES	CA
NUT FACTORY, THE	LAFAYETTE	CA
THE CAKE BOX BAKERY	LAFAYETTE	CA
CLARINE'S FLORENTINES	LAFAYETTE	CA
SPICE MOUNTAIN, LLC	LAFAYETTE	CA
NATURAL CHOICE DISTRIBUTION CO INC	LAFAYETTE	CA
BARON'S SPECIALTY FOODS, INC.	MARTINEZ	CA
CONTINENTE NUT, LLC.	OAKLEY	CA
DGA, INC.	ORINDA	CA
TULKOFF FOOD PRODUCTS WEST, INC.	PITTSBURG	CA
BIOZONE LABORATORIES, INC.	PITTSBURG	CA
BIOZONE LABORATORIES, INC.	PITTSBURG	CA
ALL STAR TAMALES	PITTSBURG	CA

<b>RAMAR INTERNATIONAL CORP.</b>	PITTSBURG	CA
<b>PRAXAIR, INC.</b>	PITTSBURG	CA
<b>JAMAICA TEA COMPANY</b>	PITTSBURG	CA
<b>THE BONAMI BAKING COMPANY INC.</b>	PITTSBURG	CA
<b>M &amp; M BAKING PRODUCTS, INC.</b>	RICHMOND	CA
<b>AVRI COMPANIES, INC.</b>	RICHMOND	CA
<b>LIVING INTENTIONS</b>	RICHMOND	CA
<b>SAFEWAY STORES, INC.</b>	RICHMOND	CA
<b>SAFEWAY RICHMOND BEVERAGE PLANT</b>	RICHMOND	CA
<b>ZOE'S COOKIES &amp; OTHER DELIGHTS, INC.</b>	RICHMOND	CA
<b>CALIFORNIA OILS CORPORATION</b>	RICHMOND	CA
<b>GRACE BAKING COMPANY</b>	RICHMOND	CA
<b>BEANERY, INC.</b>	RICHMOND	CA
<b>CASSANDRA'S WEDDING CAKES &amp; BEYOND</b>	RICHMOND	CA
<b>LA TOURANGELLE, INC.</b>	RICHMOND	CA
<b>NEW YORK BAGELS, INC.</b>	RICHMOND	CA
<b>GALAXY DESSERTS</b>	RICHMOND	CA
<b>LEMUR INTERNATIONAL, INC.</b>	RICHMOND	CA
<b>BIO ESSENCE CORPORATION</b>	RICHMOND	CA
<b>BRENTAG PACIFIC, INC.</b>	RICHMOND	CA
<b>LA TOURANGELLE, INC.</b>	RICHMOND	CA
<b>RUBICON BAKERY</b>	RICHMOND	CA
<b>LOTUS FOODS INC</b>	RICHMOND	CA
<b>SAVVY SAVORIES, INC.</b>	RICHMOND	CA
<b>ATHERSTONE FOOD, INC.</b>	RICHMOND	CA
<b>NUTIVA, INC.</b>	RICHMOND	CA
<b>CUISINE PEREL</b>	RICHMOND	CA
<b>TIBETAN TSAMPA</b>	RICHMOND	CA
<b>CALIFORNIA AUTISM FOUNDATION</b>	RICHMOND	CA
<b>CASA CHICAS</b>	RICHMOND	CA
<b>DEL CAMPO INTERNATIONAL FOODS</b>	SAN PABLO	CA
<b>SWEETMUE BAKED GOODS</b>	RICHMOND	CA